

STATE OF WISCONSIN, CIRCUIT COURT, \_\_\_\_\_ COUNTY

For Official Use

IN THE MATTER OF

☐ Amended

**Order on Petition for  
Appointment of  
Conservator**

Case No. \_\_\_\_\_

Date of Birth \_\_\_\_\_

This matter is before the court on a Petition for Appointment of Conservator and a hearing has been held. The court has personally examined the petitioner and considered any other evidence presented.

**THE COURT FINDS:**

**1. JURISDICTION, VENUE AND NOTICE**

- A. This court ☐ does ☐ does not have jurisdiction of the subject matter and of the person of the individual.
- B. This court ☐ is ☐ is not a proper venue.
- C. Notice ☐ was ☐ was not properly served.

**2. THE COURT** ☐ is ☐ is not satisfied that:

- A. the petitioner who is an adult resident of this county is unwilling or believes that he or she is unable properly to manage his or her assets or income and has voluntarily applied to the court for the appointment of a conservator of the estate; and
- B. the fiduciary and any standby conservator are suitable; and
- C. other statutory requirements for appointment of a conservator have been met.

☐ **3. CONSERVATOR OF THE ESTATE**

- ☐ A. It is appropriate to appoint and authorize a permanent conservator of the estate to perform the duties of a guardian of the estate under §54.19, and exercise the powers that do not require court approval under §54.20(3).
- ☐ B. It is appropriate to authorize the conservator of the estate to exercise additional powers requiring court approval under §54.20(2), other than to make gifts, as follows: \_\_\_\_\_
- ☐ C. It is appropriate to direct the custodian of the estate to deposit the individual's funds of \$100,000 or less in an insured account of a bank, credit union, savings bank or savings and loan association in the name of the custodian and the ward, payable only upon further order of the court, and waive bond for the custodian of the estate.

☐ **4. The petitioner has executed a durable financial power of attorney.**

- ☐ Good cause exists to revoke or limit the durable financial power of attorney because: \_\_\_\_\_

**5. SUITABILITY OF CONSERVATOR**

The following person or organization is competent and suitable to be appointed:

Type of Conservator	Name & Address	Phone
Conservator of the Estate		
Standby Conservator of the Estate		

**THE COURT ORDERS:**

The petition is:

- ☐ dismissed.
- ☐ granted as follows:

**1. POWERS OF ATTORNEY**

- ☐ The durable financial power of attorney:
- ☐ remains in effect. ☐ is revoked. ☐ is limited as follows: \_\_\_\_\_

**2. APPOINTMENT OF CONSERVATOR**

The court appoints the following:

Type of Conservator	Name & Address	Phone
Conservator of the Estate		
Standby Conservator of the Estate		

**3. LIMITATIONS AND POWERS**

The conservator is authorized to exercise powers in part or in full consistent with the above findings in a manner that is appropriate to the individual and that constitutes the least restrictive form of intervention.

**4. BOND**

The conservator of the estate:

- ☐ shall be issued letters of conservatorship upon filing ☐ surety bond ☐ signature bond in the amount of \$\_\_\_\_\_.
- ☐ is not required to file a bond provided that the conservator shall deposit the conservatee's funds of \$100,000 or less in an insured account in the name of the conservator and the conservatee, and payable only upon further order of the court. Proof of deposit shall be filed with the court within \_\_\_\_\_ days.
- ☐ is not required to file a bond and bond is waived.
- ☐ Other: \_\_\_\_\_

**5. CONSENT TO SERVE**

Letters of Conservatorship shall be issued upon filing Consent to Serve and any required bond.

**6. INVENTORY AND ANNUAL ACCOUNT**

The conservator of the estate shall file an inventory of the conservatee's assets **within 60 days**.

The conservator of the estate shall file an account **by April 15 of each year** or as otherwise required by the court as follows:\_\_\_\_\_.

**7. CHANGE OF ADDRESS**

The conservator shall immediately notify the court in writing of any change in the address of the conservatee or of the conservator.

**8. CONSERVATOR'S COMPENSATION AND REIMBURSEMENT**

The conservator's compensation and reimbursement of expenses, if any, must be approved by the court before payment is made.

**THIS IS A FINAL JUDGMENT/ORDER FOR PURPOSES OF APPEAL.**

Name of Attorney	
Address	
Telephone Number	Bar Number

Copy: Standby Conservator

**BY THE COURT:**

\_\_\_\_\_  
Circuit Court Judge/Court Commissioner

\_\_\_\_\_  
Name Printed or Typed

\_\_\_\_\_  
Date